



Policy 901
TWIST Data System Security
February 9, 2015 (*revised*)

POLICY

Local WIC programs shall follow established procedures for TWIST security processes.

PURPOSE

To ensure security of access to TWIST and confidentiality of WIC participant records. Participant data security is essential to the WIC program.

OREGON WIC PPM REFERENCES

- ◆ [450— Confidentiality](#)

TWIST TRAINING MANUAL REFERENCES:

Chapter 1, Lesson 100 — Introduction to TWIST and TWIST Security

APPENDICES

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DEFINITIONS

TWIST: The WIC Information System Tracker. The data system for the Oregon WIC Program.

User: A staff member who has access to the TWIST data system.

Role: A designation in TWIST that defines levels of access (edit, view, or no access). Roles are assigned to users.

Add-on role: A specialized role in TWIST that does not stand alone. These roles are granted to specific individuals who already have a role in TWIST but need additional access to a certain area of TWIST in order to perform a specific function.

Unique identifiers: Any data element that can be used to identify a participant (i.e., participant name, address, phone number).

PROCEDURE

Confidentiality statement

- 1.0 All WIC staff must sign a confidentiality statement to confirm they have been notified that all participant data must be kept confidential. See ◆[450--Confidentiality](#).
- 1.1. Ensure each staff member signs a confidentiality statement when hired and maintain this documentation on file.

Security roles in TWIST

- 2.0 Security roles shall be assigned and removed in TWIST with the permission of the Local Coordinator or their designee. Staff should be properly trained in the areas of

TWIST for which they have security. For a list of roles and their corresponding access, run report SA130R 'FamilyNet User Role Authorities' from the Security module.

- 2.1. The WIC Coordinator or designee is granted the role 'Set User Security Local'
- 2.2. The role 'Set User Security Local' grants the ability to add/remove users, change TWIST passwords, and assign or remove security roles to users.
- 2.3. A user with the 'Set User Security Local' can also grant add-on roles to staff members.
- 2.4. When a staff member is no longer working in the WIC program, the WIC Coordinator or designee must remove their WIC role(s). If they are no longer working in a program that requires them to use FamilyNet, their name should also be removed from the "Security" table in TWIST.
- 2.5. When the WIC coordinator leaves the program and no other staff member has the "Set User Security Local" role, the local agency administrator may contact the State WIC office to assign a new **"Set User Security Local"** role.

Security of TWIST reports

- 3.0 Participant data must be kept secure:
 - 3.1. At employee workstations, staff should 'lock' their computer screen if they leave their workstation while they have TWIST open.
 - 3.2. All documents and reports that are generated from TWIST must be kept secure (i.e., Verification of Certification (VOC), ineligibility notifications, etc.)
 - 3.3. Any document or report that includes a participant's name or any other unique identifier must be kept secure.
 - 3.4. Keep documents in a locked drawer or file cabinet, turned face down on a staffed workstation, or in an area where non-WIC staff are not permitted.
 - 3.5. See [◆450 – Confidentiality](#) for more detailed information on security of participant data.

If you need this in large print or an alternate format, please call 971-673-0040.

This institution is an equal opportunity provider.

POLICY HISTORY

Date	* Revised, Reviewed, Released

The date located at the top of the policy is the date of the most recent release. Policies are to be implemented on release date and will become compliance findings 6 months from the release date.

***Released:** Significant changes made to policy. Release notes can be found in the corresponding document on the [Policy and Procedure Manual page](#).

Reviewed: The writer looked at this policy to make sure it was still accurate. Formatting changes may have occurred.

Revised: Minor edits or formatting has occurred without need for release. USDA has accepted a policy and watermark is reviewed.

Date of Origin: Date policy was initially released

APPENDIX A

Local Agency Security Roles

PRIMARY ROLE: WIC Administrator, Manager, Supervisor

MODULES	SCOPE		
	Edit/Update	View Only	Not Allowed
Appt. Sch.	<u>Outputs</u>	<u>Scheduling</u> <u>Tables</u> <u>Wait List</u>	
Client Process	<u>Outputs</u>	All other	
Financial Management	<u>Caseload</u> : Participating Caseload	<u>Caseload</u> : Priority Freezing, State Caseload <u>Tables</u>	<u>Budgets</u> <u>FNS</u> Outputs Rebates
FI	<u>Outputs</u>	<u>Packages</u> <u>Tables</u> : All other	<u>Tables</u> :
Oper. & Mgt.	<u>Outputs</u>	<u>Operations</u> <u>Tables</u>	<u>Compliance</u> <u>Operations</u> : state acknowledgment, Library Check in/Check Out <u>Outputs</u> : Compliance, Vendor investigations
Systems Admin.	<u>Administration</u> : Bandwidth Meter, Outputs	<u>Maintain</u> : Counties	
Vendor Mgt.		<u>Communication</u>	<u>Farmers Market</u> : Farmers, Markets, Reconciliation <u>FI</u> : All other

MODULES	SCOPE		
	Edit/Update	View Only	Not Allowed
		<u>Farmers Market</u> : Administration, Coupon Maintenance, Look up and Markets. Outputs: FM coupons sent to local agencies Tables <u>Vendor</u> : Look Up	<u>Monitoring</u> <u>Outputs</u> <u>Training</u> <u>Vendor</u> : All other

PRIMARY ROLE: WIC Certifier (CPA)

MODULES	SCOPE		
	Edit/Update	View Only	Not Allowed
Appt. Sch.	<u>Outputs</u> <u>Scheduling:</u> Daily Clinic Schedule, Family Appointment, Group Education Classes, Group Screening <u>Wait lists</u>	<u>Scheduling:</u> Autodialer Extract, Automatic Scheduler, Mass Reschedule, Replace Staff, Template Maintenance <u>Tables</u>	None
Client Process	All menu items but Tables	<u>Tables</u>	None
Financial Mgt.		<u>Budgets</u> <u>Caseload</u>	<u>FNS 798</u> <u>Outputs</u> <u>Rebates</u> <u>Tables</u>
FI	<u>Outputs</u>	<u>Packages</u> <u>Tables:</u> All other	<u>Tables:</u>
Oper. & Mgt.	<u>Compliance:</u> Complaints	<u>Operations:</u> Agency/Clinic Information-WIC Review, Formula Standing Order, Staff Information	<u>Compliance:</u> All other

MODULES	SCOPE		
	Edit/Update	View Only	Not Allowed
	<u>Operations:</u> Agency/Clinic Information (except review), Communications, Organizations <u>Outputs</u>	<u>Tables:</u> All but investigation violations and sanctions	<u>Operations:</u> Check in/out, Forms Ordering, State Acknowledgement, Reservation <u>Outputs:</u> Compliance <u>Tables:</u> investigation violations and sanctions
Systems Admin.	<u>Outputs</u>	none	<u>Maintain:</u> Client Archive Parameters, Counties
Vendor Mgt.	<u>Farmers Market:</u> Coupon Look up. Administration, Maintenance <u>Outputs:</u> Farmers Market Coupon sent to LA, FM mkt elig., FM recipient profile, FM participants receiving coupons, Newly Added Vendor, Terminated Vendor, Vendor by Name. <u>Vendor:</u> Look up	<u>Compliance:</u> Complaints <u>Farmers Mkt:</u> Coupon Maintenance, Markets <u>FI:</u> Vendor FI Look-up <u>Tables</u>	<u>Communication</u> <u>Farmers Mkt:</u> Farmers, Markets, Reconciliation <u>FI:</u> all other <u>Monitoring</u> <u>Training</u> <u>Outputs:</u> All other <u>Training</u> <u>Vendor</u>

PRIMARY ROLE: WIC Clerk

MODULE S	SCOPE		
	Edit/Update	View Only	Not Allowed
Appt. Sch.	<u>Outputs</u> <u>Scheduling</u> : Auto Dialer Extract, Daily Clinic Schedule, Family Appt. Records, Group Education Classes, Group Screening, Mass Reschedule, Replace Staff <u>Wait Lists</u>	<u>Scheduling</u> : Automatic Scheduler, Template Maintenance <u>Tables</u>	None
Client Process	<u>Certification</u> : BF Tracking, Medical Data, Health History, Diet assessment, NE Plan, Food Package <u>Assignment, Temporary Newborn Enrollment and Intake</u> <u>Farmers market</u> <u>Look Up</u> <u>Outputs</u> <u>Transfer</u>	<u>Certification</u> : Progress Notes <u>Tables</u>	None
Financial Mgt.		<u>Caseload</u> : Priority Freezing	All Other
FI	<u>Outputs</u> <u>Tables</u>	Packages <u>Tables</u> : All others	<u>Tables</u> :

MODULE S	SCOPE		
	Edit/Update	View Only	Not Allowed
Oper. & Mgt.	<p><u>Compliance:</u> Complaints</p> <p><u>Operations:</u> Agency/Clinic Information (except review), Communications, (except state acknowledgment), Organizations, Reservations</p> <p><u>Outputs:</u> all other</p>	<p><u>Operations:</u> Agency/Clinic Information - WIC Review, Staff Information</p> <p><u>Tables</u></p>	<p><u>Compliance:</u> All other</p> <p><u>Operations:</u> Check in, Check out, Forms Ordering, Formula Standing Order, State Acknowledgement</p> <p><u>Outputs:</u> Client Detail Report, Modules Completed, Compliance, Open Vendor investigations, Payment details, Payment past due.</p>

PRIMARY ROLE: WIC Clerk, cont.

MODULES	SCOPE		
	Edit/Update	View Only	Not Allowed
Systems Admin.	Outputs		<u>Maintain</u>
Vendor Mgt.	<u>Farmers Market:</u> Administration, Coupon Look-up, Coupon Maintenance Outputs: FM Coupons sent to LA, FM Coupon Summary, FM Mkt Elig., FM Recipient Profile, FM Recipients receiving coupons <u>Vendor:</u> Look up	<u>Tables</u> <u>Outputs:</u> Newly Added Vendor, Terminated Vendor, Vendor by Name	<u>Communication</u> <u>Farmers Mkt:</u> Farmers, Markets, Reconciliation <u>FI:</u> All others <u>Monitoring</u> <u>Outputs:</u> All others <u>Training</u> <u>Vendor</u>

PRIMARY ROLE: WIC Coordinator

MODULES	SCOPE		
	Edit/Update	View Only	Not Allowed
Appt. Sch.	<u>Outputs</u> <u>Scheduling</u> <u>Tables:</u> Appointment Notices, Appointment Type Duration, Class Location, Nutrition Education Classes, Generic Appointment Types, Time Preferences, Postcard printer. <u>Wait list</u>	<u>Tables:</u> Appointment Statuses, Appointment Types, Non-Client Activities, Translations, Wait List Reason Codes	None
Client Process	<u>Certification</u> <u>Client Master</u> <u>Enrollment and Intake</u> <u>Farmer's Market</u> <u>Look-up</u> <u>Output</u> <u>Tables:</u> LA Interventions and LA questions <u>Transfers</u>	<u>Tables:</u> All other	None
Financial Mgt.	<u>Caseload:</u> Participating Caseload – LA, Priority Freezing <u>Output:</u> All other	<u>Budgets</u> <u>Caseload:</u> State caseload assignment <u>Rebates</u> <u>Tables</u>	FNS <u>Output:</u> Contract Food Redemptions

MODULES	SCOPE		
	Edit/Update	View Only	Not Allowed
FI	<u>Outputs</u>	<u>Packages</u> <u>Tables</u> : All other	None
Oper. & Mgt.	<u>Compliance</u> : Complaints, Complaint Look up. <u>Operations</u> : Agency/Clinic except Review, Communications, Organizations, Reservations, Staff Information <u>Tables</u> : Only Forms and Materials - Forms Inventory <u>Outputs</u> : All other <u>Tables</u> : Forms Inventory, Breastpump inventory	<u>Operations</u> : Check in, Check Out, Agency/Clinic-WIC Review <u>Tables</u> : All but Forms and Materials - Forms Inventory	<u>Compliance</u> : All other <u>Operations</u> : Forms Ordering, Formula Standing Order, State Acknowledgement <u>Outputs</u> : Client Detail Report, Compliance-client redemptions, client status, investigation summary, open vendor investigations, payment details, payment past due, vendor violations

PRIMARY ROLE: WIC Coordinator, cont.

MODULES	SCOPE		
	Edit/Update	View Only	Not Allowed
Systems Admin.	<u>Outputs</u> <u>Security</u> : Maintain User		<u>Maintain</u> : Client archive parameters, counties
Vendor Mgt.	<u>Farmers Market</u> : Coupon Maintenance, Administration, Coupon Look-up <u>Outputs</u> : Farmers Mkt coupons sent to LA, FM Coupon summary by LA, FM Mkt elig. Report, FM recipient profile rpt., FM, Part. Receiving FM coupons, Newly Added Vendor, Terminated Vendor <u>Vendor</u> : Look-up	<u>Tables</u> <u>Vendor</u> : Look Up	<u>Communication</u> <u>Farmers Market</u> : Farmers, Markets, Reconciliation <u>FI</u> : All Other <u>Outputs</u> : All Other <u>Training</u> <u>Vendor</u> : All other

SPECIALIZED ROLES

(These can stand alone, but they have limited functionality. Only allowed roles are defined, all other roles are not allowed.)

SPECIALIZED ROLE: Breastfeeding Peer Counselor

MODULES	SCOPE		
	Edit/Update	View Only	Not Allowed
Appt. Sch.			
Client Process	Certification: BF Tracking only, Client Master update and edit comes with this.		Rest of area
Vendor Mgt.			
FI			
Financial Mgt.			
Systems Admin.			
Oper. & Mgt.			

SPECIALIZED ROLE: Call Center

MODULES	SCOPE		
	Edit/Update	View Only	Not Allowed
Appt. Sch.	Outputs Scheduling: Autodialer Extract, Daily Clinic Schedule, Family Appointment, Group Education, Group Screening. <u>Wait Lists</u>	<u>Scheduling:</u> Auto Scheduler, Template Maintenance	<u>Scheduling:</u> Mass Reschedule, Replace Staff
Client Process	<u>Certification:</u> NE Plan Enrollment Look-up <u>Output:</u> Ineligibility, Termination, VOC Transfers	<u>Certification:</u> Infant/Child Medical Data	<u>Certification:</u> All Other <u>Output:</u> All Other
Financial Mgt.			
FI			All other
Oper. & Mgt.			
Systems Admin.			
Vendor			

SPECIALIZED ROLE: Lab Tech LA

MODULES	SCOPE		
	Edit/Update	View Only	Not Allowed
Appt. Sch.			
Client Process	Certification: Medical Data		Rest of area
Vendor Mgt.			
FI			
Financial Mgt.			
Systems Admin.			
Oper. & Mgt.			

ADD-ON ROLES (These roles do not stand alone.)

ADD-ON ROLE: WIC Appointment Scheduler

MODULES	SCOPE		
	Edit/Update	View Only	Not Allowed
Appt. Sch.	<u>Outputs</u> <u>Scheduling</u> <u>Tables:</u> Appointment Notices, Appointment Type Duration, Class Location, Generic Appointment Types, Nutrition Education Classes, Postcard printer base table, Time preferences. <u>Wait list</u>	<u>Tables:</u> Appointment Statuses, Appointment Types, Non-Client Activities, Translations, Wait List Reason Codes	
Client Process			
Financial Mgt.	<u>Caseload:</u> Priority Freezing		

MODULES	SCOPE		
	Edit/Update	View Only	Not Allowed
FI			
Oper &Mgt.	<u>Operations</u> : Staff Information-Staff Info.		<u>Operations</u> : Agency/Clinic Info Staff Information-Job Desc, Staff Training
Systems Admin.			
Vendor			

ADD-ON ROLE: WIC Complaint Expert

MODULES	SCOPE		
	Edit/Update	View Only	Not Allowed
Appt. Sch.			
Client Process			
Financial Mgt.			
FI			
Oper. & Mgt.	<u>Compliance</u> : Complaints <u>Outputs</u> : Complaints Referral Report		

MODULES	SCOPE		
	Edit/Update	View Only	Not Allowed
Systems Admin.			
Vendor Mgt.			

ADD-ON ROLE: WIC Complaint User

MODULES	SCOPE		
	Edit/Update	View Only	Not Allowed
Appt. Sch.			
Client Process			
Financial Mgt.			
FI			
Oper. & Mgt.	<u>Compliance</u> : Complaints		

MODULES	SCOPE		
	Edit/Update	View Only	Not Allowed
Systems Admin.			
Vendor Mgt.			

ADD-ON ROLE: WIC Local Super User

MODULES	SCOPE		
	Edit/Update	View Only	Not Allowed
Appt. Sch.	<u>Scheduling</u> : All <u>Tables</u> : Appt. Types, Appt. Durations, Class Locations, Generic Appt. Type, Nutrition Ed	<u>Tables</u> : Appt. Statuses, Appt. Types, Non Client Activities, Translations, Wait List Reason Codes.	

MODULES	SCOPE		
	Edit/Update	View Only	Not Allowed
	Classes, Post Card Printer Base Tables, Time Preferences. <u>Wait List:</u> Wait List		
Client Process	<u>Certification:</u> All		
Fin Mgmt	<u>Caseload:</u> Priority Freezing		
FI			
Oper. & Mgt.	<u>Operations:</u> Agency/Clinic Information, Communications, Formula Standing Order, Organizations, Reservations, Staff Information. <u>Tables:</u> Forms Inventory		<u>Operations:</u> Check In, Check Out, Forms Ordering, State Acknowledgement. <u>Outputs:</u> None
Systems Admin.			
Vendor	<u>Outputs:</u> Newly Added Vendor, Terminated Vendor, Vendor by Name		<u>Outputs:</u> All Other

ADD-ON ROLE: WIC Print Reports

MODULES	SCOPE		
	Edit/Update	View Only	Not Allowed
Appt. Sch.	<u>Outputs</u>		

MODULES	SCOPE		
	Edit/Update	View Only	Not Allowed
Client Process	<u>Outputs</u>		
Vendor Mgt.	<u>Outputs</u>		
FI	<u>Outputs</u>		
Oper. & Mgt.	<u>Outputs</u>		<u>Outputs:</u> Compliance Outputs, Vendor violation outputs.
Systems Admin.	<u>Outputs</u>		
Vendor			<u>Outputs:</u> All

ADD-ON ROLE: WIC Training Supervisor

MODULES	SCOPE		
	Edit/Update	View Only	Not Allowed
Appt. Sch.			
Client Process			
Vendor Mgt.			
FI			
Farmer's Mkt.			
Reports			
Systems Admin.			
Oper. & Mgt.	<u>Operations</u> : Staff Info - Staff Training tab		Rest of area

ADD-ON ROLE: Set Security

MODULES	SCOPE		
	Edit/Update	View Only	Not Allowed
Appt. Sch.			
Client Process			
Vendor Mgt.			
FI			
Farmer's Mkt.			
Systems Admin.	<u>Security: Maintain-User</u>	<u>Security: Maintain-Roles</u>	Rest of area
Oper. & Mgt.			

ADD-ON ROLE: Breastpump Coordinator

MODULES	SCOPE		
	Edit/Update	View Only	Not Allowed
Appt. Sch.			
Client Process			
Vendor Mgt.			
FI			
Farmer's Mkt.			
Systems Admin.			
Oper. & Mgt.	<u>Tables:</u> Breastpump Inventory		